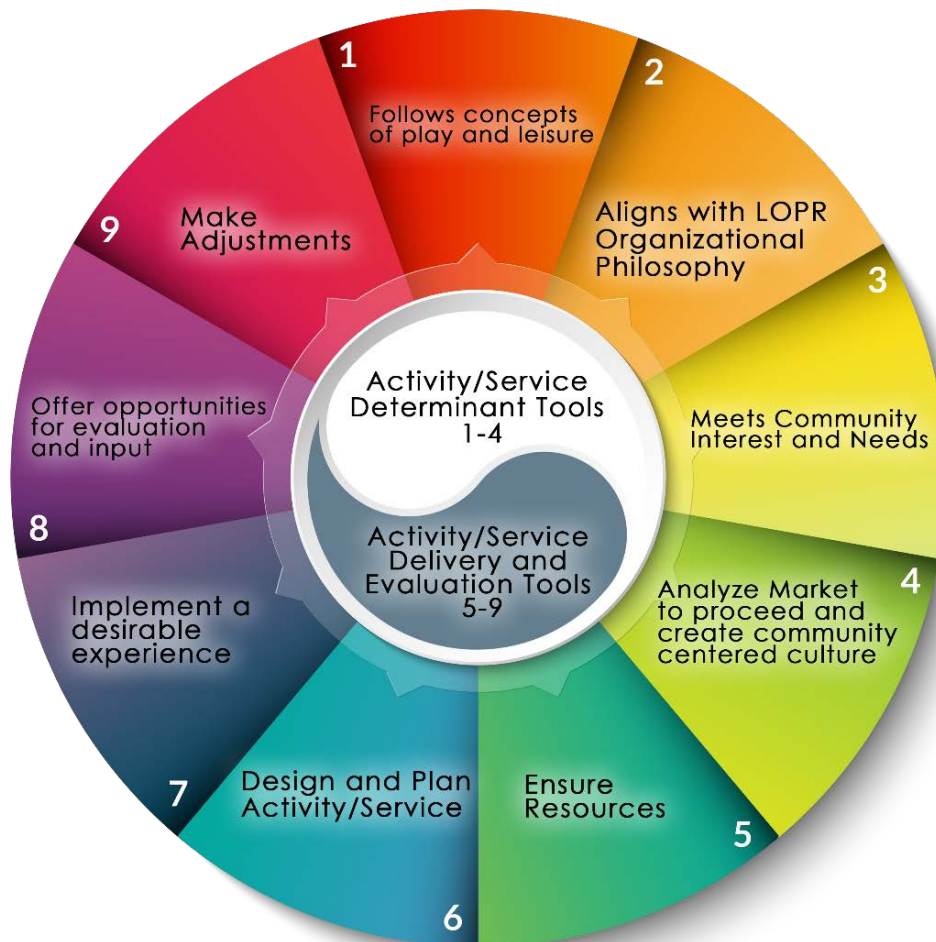


PARKS & RECREATION

Date: 12/31/2016 **Updated:** 12/31/2022 **Date To Be Reviewed:** Three years - 12/31/2025

Title of Document: 6.1.1.B LOPR_Activity and Service Development and Delivery Process (ASDDP)





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PARKS & RECREATION

BACKGROUND:

An integration of information from three plans (all of which align to the City's Comprehensive Plan supports and provides direction for provision of diverse programming and addresses recreation as an essential service to support the community's health and well-being.

Table 4-1 illustrates the relationship between *Parks Plan 2025* goals and the City's Comprehensive Plan, followed by a summary of how the goals relate to the Comprehensive Plan's Action Areas.

Table 4-1: Goals and Action Areas Summary

Comprehensive Plan Action Areas	Parks Plan 2025 Goals			
	Filling Geographic Gaps	Investing in Existing Parks	Providing Recreation Options	Enhancing Stewardship, Maintenance & Operations
<i>Community Culture</i>	•	•	•	•
<i>Complete Neighborhoods & Housing</i>	•	•	•	
<i>Connected Community</i>	•	•	•	
<i>Economic Vitality</i>	•	•	•	•
<i>Healthy Ecosystems</i>	•	•		•
<i>Community Health & Public Safety</i>	•	•	•	•
<i>Inspiring Spaces & Places</i>	•	•	•	•

LOPR Parks Plan 2025 Goal 3: Providing Recreation Options 3.3 Provide diverse programs/events and 3.4 Provide Recreational programs to address essential services

2.5 LOPR_Parks & Recreation Strategic Profile Goal 1: Ensure Recreation Strategic Plan and Parks Strategic Plan align to Community Health, Public Safety and Recreation Goals 5 and 8 of the City Comprehensive Plan, Goals 2, 3 and 4 of Parks Plan 2025

2.5.A LOPR_Recreation Strategic Plan 2021-2024 provides guidance for the five-year period with goals, objectives and actions of:

- A. Offer high quality programs and services
- B. Recreation programs and services are valued
- C. Meet or exceed our financial performance expectations
- D. Ensure recreation operations are aligned with CAPRA standards



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CONTEXT AND PURPOSE:

In an ongoing effort to provide the community of Lake Oswego desired programs, activities and services, the ASDDP continues building on the mission, vision and values of LOPR. The process is intended to provide an ongoing strategic and objective way to evaluate programs and services and ensure we are responding to changing community needs and market conditions, including the consideration of the LOPR's position and role relative to other providers and the financial support appropriate for the service.

All new Program/Activity/Service proposals are run through the **9 STEP ASDDP** to determine if the program/activity/service should be offered; and if so, how it should be delivered (in-house or through collaboration) and the appropriate fee calculation method, etc. All existing programs/activities and services are evaluated and analyzed at a minimum annually through this process utilizing the Post Program Success Checklist. The ASDDP also provides direction for program research and development, activity and services planning and implementation, and lastly, performance evaluation and adjustment opportunity.

The LOPR ASDDP uses a systematic and studied approach in determining what programs, activities and services shall be provided by the agency. The determinants are based on six CAPRA conceptual foundations:

1. Conceptual foundations of play, recreation and leisure
2. Aligns with agency philosophy, mission and vision, goals and objectives
3. Constituent/Community interest and desired needs
4. Creates a constituent-centered culture
5. Experiences desirable for clientele
6. Community opportunities

ASDDP GOALS

The process serves as the primary method for researching, developing, designing, implementing and measuring the success in achieving desired program, activity and service objectives and outcomes. Program and service determinants are explained in **6.1.1 LOPR_Program and Service Determinants**. The critical questions that are addressed in this process are in two sections, Determinant Tools and Delivery Tools. Section 1-4 asks and answers questions for determination of provision of activities and services and Section 5-9 asks the questions for successful delivery of activities and services.



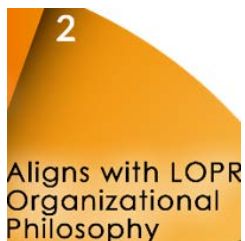
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Section 1: Activity & Service Determinant Tools Steps 1-4



Follows Concepts of Play and Leisure: *Does the activity or service follow concepts of recreation play and leisure?*

LOPR determines a service or activity provides individual growth and development, supports creativity, and self-enhancement and delivers purposeful and wholesome activities, events and services with positive themes that improve the quality of life for members of the community. Services are built upon concepts such as the pursuit of joy and pleasure, excitement, and challenge as well as conservation and stewardship of the land.



Aligns with LOPR Org: *How closely aligned is the program, activity or service to the Department's vision, mission, values and strategic initiatives?*

Meets **1.4 LOPR_Mission Statement** and **1.4.A LOPR_Values Statement**

Meets **2.5.A LOPR_Recreation Strategic Plan 2021-2024**

Meets **6.4.1 LOPR_Community Health and Wellness Education and Promotion** Living Well in LO Powered by Parks & Recreation health initiative goals



Meets Community Needs: *Is their sufficient community need and interest to support developing or continuing the program, activity or service? For existing programs, understand where a program is in its lifecycle.*



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Includes an aspect of at least one or more Community Needs, Desires and Outcomes as determined by Parks Plan 2025 Goal 3: PROVIDING RECREATION OPTIONS:

- 3.1 Develop site master plans and designs.
- 3.2 Reflect Lake Oswego's unique identity.
- 3.3 Provide diverse programs/events.
- 3.4 Provide programs to address essential services.
- 3.5 Introduce new recreation facilities, amenities.
- 3.6 Expand Urban Agriculture.
- 3.7 Investigate options for a multi-purpose recreation center.
- 3.8 Develop a public plaza in Lake Grove.



Analysis to Create Community Culture: *Are there other organizations providing the program, activity or service and if so is there a reason that the Department should be providing as well (community expectation, market capacity, different level of service, etc.). Does the activity or service meet the needs of a specific underserved population? Should collaboration be considered?*

Identify how the target market for the program/service was considered by either professional recommendation or by participant involvement input. The activity may serve a population that has historically been underserved. These populations have been determined for Lake Oswego to be: Seniors, Teens, Low Income, Disabled and Minority populations as stated in **6.3.1**

LOPR_Outreach to Diverse Underserved Populations

Ensure the activity or service is not duplicated within LOPR (or other City departments.) Use data to support that the demand for the service or activity outweighs the supply of the activity or service within close proximity to Lake Oswego. Identify the size of the potential market, its particular appeal to the market, and anticipated participation in the proposed or existing program/activity or service. Study the program/service impact for existing recreation programs targeted to the same market. The activity or service should begin as an entry level experience that can possibly enhance local business or recreation provider. Identify any other providers of the program/service and determine how many and what ability of people served. Determine



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that the activity or service differs from other providers, how it differs and for what reasons it is important to provide the service. Determine the desired outcomes for the service or activity

Section 2: Activity & Service Delivery and Evaluation Tools 5-9



5 Ensures Resources: *Does the Department have the resources (experience, background, knowledge from staff, appropriate facilities, adequate funding etc. necessary to provide the program, activity or service?*

Identify and ensure the availability of all resources necessary to support the development and implementation of the proposed program/service, including: qualified staff or contracted service provider, facilities, and financial requirements. Determine if the activity or service meets existing staffing availability, qualifications or capacity and coordination responsibilities.

Determine what facility will be used for activity or service and determine availability, capacity and specific needs or impact on other programs. Location selection is determined by advantages, needs and availability for the activity or service. Determine equipment needed and availability to support the program and storage impacts. Refer to the Cost Recovery Continuum and determine what are the cost recovery model guidelines such as, requirement of direct subsidy, or recover all additional costs required to provide the service or cover 100% or more of all costs (direct and indirect) associated with providing the service. Determine if the activity or service will meet expense to revenue guidelines for type of activity or service category.

Determine and ensure the correct General Ledger codes, fee charges, and activity categories are correct in the Active Net registration system.



6 Design and Planning a Service or Activity

Should the activity or service be offered or continued and how? Should the service be offered as an in-house program or should collaboration be considered in the delivery of the service? What cost recovery level should be expected? What pricing methods are appropriate for the service?

Using the information gathered in the preceding steps, run the proposed service through one or more of the Program and Facility Evaluation decision tool models to determine if/how to proceed with the service.



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Use of one or more **Program and Facility Evaluation Tool Models:**

Should the Activity/Service be offered or continued and how?

A. Activity & Marketing Plan Checklist/Worksheet EXHIBIT A

How should the activity/service be planned, marketed, and promoted?

Should the service be offered as an in-house program or should collaboration be considered in the delivery of the service?

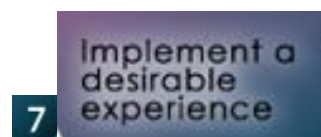
B. Programming 101 Cheat-sheet EXHIBIT B

What cost recovery level should be expected?

What pricing methods are appropriate for the service?

C. Activity Fee Calculators, Employee or Contractor led, Adult or Youth EXHIBIT C

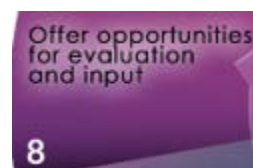
Ensure correct GL codes, fee charges, and activity categories are correct in Active Net registration system



Implement a desirable experience

Is the service/activity planning and coordination complete? Is it after the planning and coordinating effort is made, registrations are tallied and managed, all locations are set up, materials collected and supplied and service or activity leader or volunteer is ready to present, the actual occurrence is experienced by participants. The activity or service provides elements of individual growth and development and delivers purposeful activities, events and services with positive themes that improve the quality of life for members of the community, LOPR has achieved the goal of implementation of a desirable experience. Service and activities are built upon concepts such as the pursuit of joy and pleasure as well as excitement and challenge and conservation and stewardship of the land, the participants of the service or activity create a bonding of shared experience to create a sense of community.

[LOPR 2023 Winter Spring Activities Guide](#)



Offer opportunities for evaluation and input;

Conduct evaluation utilizing Customer Excellence survey process:

Participant involvement in program design offerings and in implementation performance includes input provided from Community Survey, Department Customer Excellence Survey, focus groups, dot surveys, and practical instructor and customer feedback.



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Evaluation process surveys are sent to measure customer satisfaction with offerings and solicit additional program interest feedback are sent to participants the week after activities end from the 1st to the 15th and 16th to the last day of each month. [Survey Monkey](#) (purchased in 2022 by Momenitive) is the vehicle LOPR uses to capture survey results. A web link (sent in an email to participants/payers) is used to access the Customer Excellence Survey **EXHIBIT D**.

At monthly programming meetings, staff discuss options for improvements, adjustments, or eliminations to various activities in a group setting to plan for next season offerings.

[Customer Excellence Results Packet FY21-22](#)



9. Adjust using a Post Program Success Checklist

Upon completion of the survey process, conduct an analysis to adjust with a post activity success checklist. EXHIBIT E

Use information gathered from Customer Excellence Survey results, instructor evaluation After an activity and in particular, a new activity that is piloted, use a Post-Activity budget and worksheet with actuals to evaluate cost recovery and evaluate success of the activity.

Summary

A successful activity begins and ends with researching, developing, planning, implementing and evaluating in constant circulation. A collection of activities within a Division and program is evaluated annually by program supervisors and managers through reports that include financial and activity summaries' rollups, numerical data for specific divisions and programs to show the ratio of offers and held activities, number of participants and participant hours, plus revenue and expense comparisons and direct-cost recovery percentages.

An example of overall success is the **Recreation Division Performance Metrics Report** (described above) which is produced annually. **EXHIBIT F** is utilized to identify programming trends which are cyclical and to provide a constant review of the inventory of programs. The evaluation of results leads to LOPR's success, and most importantly, serves the community in a healthy and positive way.



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Links to Sources:

LOPR [Parks Plan 2025](#)

[Parks Plan 2025 Community Needs Assessment Report](#)

[LOPR 2023 Winter Spring Activities Guide](#)

[Survey Monkey](#)

[Customer Excellence Results Packet FY21-22](#)

Related Documents:

1.4 LOPR_Mission Statement

1.4.A LOPR_Values Statement

2.5.A LOPR_Recreation Strategic Plan 2021-2024

6.1.1 LOPR_Program and Service Determinants

6.1.1.A LOPR_Res Non-Res Policy

6.1.1.C LOPR_Cost Recovery Continuum

6.1.2 LOPR_Participant Involvement

6.4.1 LOPR_Community Health and Wellness Education and Promotion

2021 Community Survey Report (2.9 E7)

2018 Parks Rec Survey (2.9 E8)

Exhibits:

A: Activity & Marketing Plan Checklist/Worksheet

B: Programming 101 Cheat-Sheet

C: Activity Fee Calculators, Employee or Contractor, Adult or Youth

D: Customer Excellence Survey

E: Post Program Success Checklist

F: Recreation Division Performance Metrics



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EXHIBIT A: Activity & Marketing Plan Checklist/Worksheet



LAKE OSWEGO ACTIVITY AND MARKETING PLANNING WORKSHEET



ACTIVITY TITLE: _____

PROGRAM PLANNER NAME: _____ DIVISION: _____

PRE-CHECKLIST OF PROGRAM DETERMINANTS - CIRCLE YES/NO NEXT TO DETERMINANT QUESTION

1. Follows concepts of play and leisure? **YES NO**
Provides individual growth and development
Supports creativity and self-enhancement
Is a purposeful and wholesome activity
Improves quality of life
Brings joy, excitement, challenge or involves stewardship of the land
2. Aligns with LOPR Philosophy? **YES NO**
Follows LOPR Mission, and Values statements
Meets Rec Strategic Program Goals
Meets Living Well in LO Powered by Parks & Recreation health initiative goals
3. Meets Community Needs, Desires and Outcomes? **YES NO**
Health and Wellness
Human Development
Connection with Nature
Recreation Experience
4. Analyzed the market to create a community centered culture? **YES NO**
Participant Involvement in program design and offer
Serves a unique or underserved population
Enhances local business offers
Entry level offering at conceptual level
Not a duplicated service within the Department
5. Ensure Available Resources? **YES NO**
Meets cost recovery model guidelines
Meets E:R guidelines
Meets existing on-call hourly requirements or vendor contract guidelines
6. Design/Plan Service-Activity? **YES NO**
Use of one or more Program Planning Tools:
 - Programming 101 Cheat-sheet to ensure correct GL codes, fee charges, and activity categories are correct in Active Net
 - Program & Marketing Plan (this doc)
 - Activity Fee Calculators, Employee or Contractor led, Adult or Youth
Location selection determined by advantages, needs and availability
7. Implement the Service/Activity? **YES NO**
8. Offer opportunities for evaluation and input? **YES NO**
Use budget calculator after delivery to check financial outcome
Conduct evaluation using Customer Excellence program
9. Make adjustments **YES NO**
Conduct analysis with a post activity success checklist



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ACTIVITY TITLE: _____

PROGRAM PLANNER NAME: _____ DIVISION: _____

DESCRIPTION, GOAL AND OBJECTIVE:
(Check determinants list)

BASIC BUDGET ESTIMATE:
PERSONNEL/STAFFING:

SUPPLIES:

SERVICES:

OTHER:

EXPECTED REVENUE : _____

EXPENSE TOTAL: _____

ESTIMATE NET GAIN/LOSS: _____

Circle items below and check off when completed:

Marketing Checklist

6 Months Prior

Activity Guide Description
Press Release
Local event calendars (radio, news & paper)
Active Registration Site Description

4-3 Months Prior

Website Calendar Event

2 Months Prior

Poster/Flyer Distribution
Parks & LOPR Facility Posters

1 Month Prior

City & Community site media
Print Media -LO Review- Hello LO
Electronic Newsletters

4-1 Week Prior

Social Media Promo
Active E-mail Blast
Content on digital signs
Neighborhood Association notifications
Next Door

Other Opportunities

Park Banners
Light Pole Flag
Sandwich Boards

1-4 Weeks Post

Council Digest recap
Program Participant Survey
Wrap up



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EXHIBIT B: Programming 101 Cheat-Sheet

LOPR PROGRAMMING 101 CHEATSHEET

LOPR uses both employees and contractors to provide programs and each have their own set of requirements, fee structures and procedures for class management.

PAID INSTRUCTORS

- These instructors are employees of the City of Lake Oswego and are paid hourly for their services. They are not required to hold any independent insurance and are covered by the city for worker's comp, OR sick leave, etc.
- Employees are not allowed to promote any side business to LOPR participants or use their employment with the city for personal gain. So, if they have a business specifically related to classes they teach, they will typically opt to become a contractor.
- **PAID INSTRUCTOR FEE DEVELOPMENT**
 - For paid instructors, use the EMPLOYEE FEE DEVELOPMENT form to calculate class fees
 - The development form is pre-set, you only have to edit the cells in **YELLOW**
 - Enter their hourly rate, length and number of classes, prep time, supplies and preferred mins/max
 - The form will auto-generate a resident fee; if that fee seems too low/too high, you can adjust the mins/~~mins~~maxs

CONTRACTED INSTRUCTORS

- These instructors are contractors through the City of Lake Oswego and are paid per participant for their services. They are required to hold insurance (requirements attached) and add the City of Lake Oswego as insured.
- These companies are allowed to promote additional activities to participants as long as it does not directly conflict with LOPR programming.
- Contractors are required to provide their own employees and submit a background check for each employee that will be teaching prior to class start dates.
- Contractors set their own per participant fees; this is the fee they charge us to provide the class, that they bill us for after completion of each class.
- Contractors are required to provide all their own supplies, equipment, staffing; we only provide the space (if needed) and admin support.
- **CONTRACTOR FEE DEVELOPMENT**
 - We charge a percentage on top of their per participant fee and that is what we charge the public.
 - For classes held at LOPR sites: LOPR charges 22.5% on top of a contractors per participant fee.
 - i.e: \$125 per participant x 1.225 = \$154 to public
 - For classes held at contractor sites: LOPR charges 17.5% on top of a contractors per participant fee
 - i.e: \$125 per participant x 1.175 = \$147 to public

- **When calculating fees, always round up to the nearest dollar**

RES/NON-RES FEE CALCULATION

The resident-fee is the flat fee you calculated above for either employee/contractor.

Non-Resident Fee Calculation:

\$0-50 x 1.5

\$51-99 x 1.25

\$100+ x 1.15

i.e: \$125 resident fee; \$125 x 1.15 = \$144 non-resident



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Some tips:

- Raise your fees a little bit annually or every two years; this helps you keep up with the council-mandated fee increases and won't price-shock customers
- If a fee appears too high
 - Negotiate with a contractor to adjust pricing
 - Adjust the mins/~~maxs~~
- If a fee appears too low
 - Adjust the mins/~~maxs~~
 - Use this fee structure (this is the council suggested increase for 2020)
 - >\$10 = add \$1
 - \$10-40 = add \$1
 - \$41-60 = add \$2
 - \$61-99 = add \$3
 - \$100 = add \$4
 - Let it ride and raise it the following year or raise it to match other comparable classes and know you may pay the instructor more the next year or won't need to raise the fee for 1-2 years
- Ivan can make exceptions to insurance requirements on a case-by-case basis but he rarely does it anymore. If a contractor does not have the insurance and is unwilling to get it, we usually will pass on contracting with them. This is especially true for outdoor or fitness contractors.

For New Classes:

- When starting a new class, we will typically allow that class to be offered for TWO catalog cycles. If a class has not run after two cycles, we will drop it. This is in the contractors' contract and we tell employees during the first program planning discussion.
- If a class goes once but then not again, we will allow it to continue to run for another catalog cycle or try to adjust something like mins/max, day/time, etc.
- If a class is under minimum, but you would like it to run, we are allowed to do that but only for one-two class cycles. If a class is consistently running under minimum we can either change mins/~~maxs~~ and adjust the fees or drop the class.

Class Management

- **For Employees:** LOPR decides when to cancel a class. Classes are managed on Tuesday/Thursdays or Mondays for camps. When the front desk emails class management details, programmers can decide to run/cancel that class. Instructors are more than welcome to be included on this decision
- **For Contractors:** The Contractors decide when to cancel a class or run under minimum. If a contractor would like to run a class under minimum, they are allowed to do so. They are allowed to take students off a waitlist and add to a class but only if their contract maximum specifies the increase. If it doesn't, we can do a class amendment. If a contractor consistently adds participants from a waitlist we can make their contract maximums larger than the registration maximums and avoid an amendment.



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EXHIBIT C: Activity Fee Calculators, Employee or Contractor, Adult or Youth

Contractor Calculating Participant Cost

Use this sheet when you know the per participant cost- it will output res and non-res fees

ONLY EDIT YELLOW CELLS

Contractor				Term			
Class Title:				Fee per Participant			
ON SITE (22.5%)				OFF SITE (17.5%)			
Resident Fee (unrounded)	\$	-		Resident Fee (unrounded)	\$	-	
RES FEE (rounded up)	\$	-		RES FEE (rounded up)	\$	-	
NON-RES FEE (rounded up)				NON-RES FEE (rounded up)			
<u>Non-Res Calculations</u>		Rounded up		<u>Non-Res Calculations</u>		Rounded up	
MULT res by 1.5	\$	-	\$ -	MULT res by 1.5	\$	-	\$ -
do not mult by 1.25	\$	-	\$ -	do not mult by 1.25	\$	-	\$ -
do not mult by 1.15	\$	-	\$ -	do not mult by 1.15	\$	-	\$ -

Participant Cost Calculating Contractor Fee

Use when you know the desired res cost and it will output the fee per participant to go to Contractor and non res cost

ONLY EDIT YELLOW CELLS

Contractor				Term			
Class Title:				Fee per Participant			
Term:				Fee per Participant			
ON SITE (22.5%)				OFF SITE (17.5%)			
Fee To Contractor	\$	-		Fee To Contractor	\$	-	
Desired Res Fee		1.225		Desired Res Fee			
NON-RES FEE (rounded up)				NON-RES FEE (rounded up)			
<u>Non-Res Calculations</u>		Rounded up		<u>Non-Res Calculations</u>		Rounded up	
MULT res by 1.5	\$	-	\$ -	MULT res by 1.5	\$	-	\$ -
do not mult by 1.25	\$	-	\$ -	do not mult by 1.25	\$	-	\$ -
do not mult by 1.15	\$	-	\$ -	do not mult by 1.15	\$	-	\$ -



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Employee Cost Calculating Adult Participant Cost

ONLY EDIT THE YELLOW CELLS				
Class Title:		Term:		
Instructor:		Hourly Pay Rate:		
Total # of Classes:				
Hrs/Class:		Total Class Hrs	0	
Prep/Class		Total Prep Hrs	0	
		Total Instr. Hrs	0	
Total Materials Cost	\$ -	Total Personnel Cost	\$ -	
Personnel and Materials Subtotal:	\$ -			
Parks & Rec Admin (25.5%) min participant #:	\$ -			
Cost/min. student:	#DIV/0!			
Per student materials \$:	\$ -			
Total Cost/Student	#DIV/0!			
RES FEE	#DIV/0!	Non-Res Calculations	ROUNDED UP	
NON RES FEE		#DIV/0!	#DIV/0!	#DIV/0!
		#DIV/0!	#DIV/0!	#DIV/0!
		#DIV/0!	#DIV/0!	#DIV/0!

Employee Cost Calculating Youth Participant Cost

ONLY EDIT THE YELLOW CELLS				
Class Title:		Term:		
Instructor:		Hourly Pay Rate:		
Total # of Classes:				
Hrs/Class:		Total Class Hrs	0	
Prep/Class		Total Prep Hrs	0	
		Total Instr. Hrs	0	
Total Materials Cost	\$ -	Total Personnel Cost	\$ -	
Personnel and Materials Subtotal:	\$ -			
Parks & Rec Admin (25.5%) min participant #:	\$ -			
Cost/min. student:	#DIV/0!			
Per student materials \$:	\$ -			
Total Cost/Student	#DIV/0!			
RES FEE	#DIV/0!	Non-Res Calculations	ROUNDED UP	
NON RES FEE		#DIV/0!	#DIV/0!	#DIV/0!
		#DIV/0!	#DIV/0!	#DIV/0!
		#DIV/0!	#DIV/0!	#DIV/0!



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EXHIBIT D: Customer Excellence Survey

Title of Document: 10.1.C.2 LOPR_Current Customer Excellence Survey
Date: 08/20/2021 Updated: 6/30/2022 To Be Reviewed: Three Years – 06/30/2025

CUSTOMER SATISFACTION SURVEY

LAKE OSWEGO PARKS & RECREATION



1. Name of Activity 

2. What are your reasons for participation in the activity? Please check ALL that apply. 

☐ Recreational enjoyment
☐ Health and wellness purpose
☐ Learn something new
☐ Provide an activity or care for child/children
☐ Enhance and develop current skills or knowledge
☐ Engage with others that have similar interests
☐ Other

Any additional comments:

3. How did you learn about this activity? Please check ALL that apply. 

☐ LO Parks & Recreation Activities Guide
☐ LOParks.org Registration Website
☐ LO City Website www.ci.laoswego.or.us/parksrec
☐ Hello LO
☐ Lake Oswego Review
☐ Social Media- Facebook/Twitter/Instagram
☐ Return Customer
☐ Recommended by a Friend/Family Member
☐ Other

Any additional comments:


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Title of Document: 10.1.C.2 LOPR_Current Customer Excellence Survey
Date: 08/20/2021 Updated: 6/30/2022 To Be Reviewed: Three Years – 06/30/2025

4. Did participation in the activity meet your expectations? 

☐ Yes

☐ No

Any additional comments:

5. If applicable, how do you rate the instructor's/activity leader's preparedness and knowledge of the activity? (Not applicable to sports leagues) 

Very Satisfied

Somewhat Satisfied

Neutral

Somewhat
Dissatisfied

Very Dissatisfied

☐

☐

☐

☐

☐

Any additional comments:

6. How do you rate the value received for your activity fee? 

Very Satisfied

Somewhat Satisfied

Neutral

Somewhat
Dissatisfied

Very Dissatisfied

☐


☐

☐

☐

☐

Any additional comments:

7. Would you recommend the activity to a friend or family member? 

☐ Yes

☐ No

Any additional comments:



Director Approval - Original Approval Date: _____
Update Approval Date: _____
Signature: _____


PARKS & RECREATION


Title of Document: 10.1.C.2 LOPR_Current Customer Excellence Survey

Date: 08/20/2021

Updated: 6/30/2022

To Be Reviewed: Three Years – 06/30/2025

8. Do you have a suggestion for an activity you would like to see offered through LO Parks & Recreation? 

9. Please enter your email address or phone number for a chance to receive a \$50.00 LO Parks & Recreation gift certificate. A winner is randomly selected each activity season. 

Done

Thank you for providing valuable feedback!

3 | Page



Director Approval - Original Approval Date: _____
 Update Approval Date: _____
 Signature: _____

PARKS & RECREATION

EXHIBIT E: Post Program Success Checklist

LOPR POST ACTIVITY BUDGET WORKSHEET AND CHECKLIST				
ACTIVITY Name				
Programmer Name				
	Anticipated	Actual	Savings	Notes
Salaries/Hours				
Time: Prepare, Implement, Debrief Report				
Sub Total				
Supplies				
Sub-Total				
Advertising/Promotion				
Sub-Total				
Other				
Sub-Total				
GRAND TOTAL				
REVENUES				
PARTICIPATION #				
GRAND TOTAL				
NET REVENUE				
NET LOSS				



Director Approval - Original Approval Date: _____
 Update Approval Date: _____
 Signature: _____

PARKS & RECREATION

POST ACTIVITY SUCCESS CHECKLIST

Activity _____ Date _____

1. Did the activity go or was it cancelled? If cancelled, why?

2. Which community needs/goals were met? Check Box

Health and Wellness

Human Development

Connection with Nature

Recreation Experience

3. Resources

What planning tools were used to plan and market activity?

CIRCLE ANSWER

Did the activity meet Cost Recovery Model Guidelines?

YES

NO

Did the activity meet Expense:Revenue Guidelines?

YES

NO

Did the activity run with fewer than minimum participants?

YES

NO

4. Activity Survey Results

GOOD OK NOT GOOD

5. Will activity be offered again?

YES

NO

6. Adjustments?

YES

NO

7. What will be done differently?



Director Approval - Original Approval Date: _____
 Update Approval Date: _____
 Signature: _____

PARKS & RECREATION

EXHIBIT F: Recreation Division Performance Metrics

City of Lake Oswego Parks & Recreation RECREATION DIVISION PERFORMANCE METRICS November 10, 2021 Report		52.1 Sports Division		52.3 Adult Fitness		52.3 Cultural Division		52.4 Luther Farm Division		52.7 Events Division		52.8 Outdoor Division		55.0 Golf Division *First year direct expense measured		56.0 Tennis Division Results impacted by loss of seasons in May and reduced scheduling due to delay of planned Jan. closure to end of May		26.0 ACC	
Year over Year Performance FY 20-21/FY 19-20																			
FY 20-21 Annual Report Data		TARGET																	
Offers			173		321		728		150		48		1739		49		180		1290
Held			159		251		336		121		48		1714		48		157		1290
H/O Ratio		85%	91.91%		78.19%		46.15%		80.67%		100.00%		98.56%		97.96%		87.22%		100.00%
# Participants			3044		812		6278		1057		101823		5133		57297		1183		30536
Over 100% = growth	Yr/Yr Growth		114.31%		65.86%		68.66%		71.08%		61.41%		132.12%		146.32%		42.55%		77.86%
Revenue Earned			115756		42747		230690		211334		116367		354431		959384		885437		2177279
Over 100% = growth	Yr/Yr Growth		124.32%		58.11%		130.44%		112.62%		99.84%		234.24%		156.01%		75.88%		144.57%
Direct Expense			66385		31580		216505		136523		95011		155516		214116				
Under 100% = Reduction in Expense	Yr/Yr Growth		66.96%		49.69%		87.95%		82.62%		58.45%		104.31%		N/A*				
Cost Recovery % (Direct)		100%	174.37%		135.36%		106.55%		154.80%		122.48%		227.91%		448.07%				
Customer Feedback - Goal is 50 responses per year per division																			
Number of Responses	50		4		50		70		80		20		3		9		18		Note 1
% YES Participation Met Expectations	80%		75%		94%		98%		91%		100%		100%		100%		100%		Note 1
% Very Satisfied Value Received	80%		25%		82%		80%		71%		85%		100%		78%		50%		Note 1
% YES Would Recommend to Friend	80%		75%		98%		98%		95%		100%		100%		100%		100%		Note 1
Note 1: ACC programming was all virtual through social media for FY 20-21, so no surveys were conducted via the Active Net class ending survey process.																			
FY 19-20 Annual Report Data		TARGET																	
Offers			144		174		663		129		48		1739		30		400		1160
Held			117		163		575		114		48		1714		18		391		1160
H/O Ratio		85%	81.25%		93.68%		86.73%		88.37%		100.00%		98.56%		60.00%		97.75%		100.00%
# Participants			2663		1233		9144		1487		165796		3885		39160		2780		39221
Over 100% = growth	Yr/Yr Growth		62.32%		67.23%		83.57%		85.02%		75.36%		84.66%		97.51%		75.77%		N/A
Revenue Earned			93108		73560		176858		187649		116558		151314		614961		1166832		1506039
Over 100% = growth	Yr/Yr Growth		75.25%		64.42%		52.94%		127.93%		61.58%		84.38%		71.09%		93.76%		N/A
Direct Expense			99145		63550		246166		165247		162564		149084						
Under 100% = Reduction in Expense	Yr/Yr Growth		92.10%		79.90%		91.68%		170.02%		107.68%		82.58%						
Cost Recovery %		100%	93.91%		115.75%		71.85%		113.56%		71.70%		101.50%						
Customer Feedback - Goal is 50 responses per year per division																			
Number of Responses	50		10		63		78		29		67		86		3		46		83
% YES Participation Met Expectations	80%		90%		90%		92%		90%		94%		100%		98%		98%		90%
% Very Satisfied Value Received	80%		80%		83%		73%		72%		49%		80%		67%		61%		78%
% YES Would Recommend to Friend	80%		80%		93%		87%		93%		85%		99%		67%		98%		90%
FY 18-19 Annual Report Data		TARGET																	
Offers			165		332		915		160		57		1799		47		495		
Held			129		319		766		140		57		1764		24		482		
H/O Ratio		85%	78.18%		96.08%		83.72%		87.50%		100.00%		98.05%		51.06%		97.37%		
# Participants			4273		1834		10942		1749		220014		4589		40161		3669		
Over 100% = growth	Yr/Yr Growth		61.58%		90.97%		80.65%		79.10%		99.63%		84.75%		100.01%		92.96%		
Revenue Earned			123725		114189		334088		146679		189270		179315		865000		1244483		
Over 100% = growth	Yr/Yr Growth		95.10%		105.14%		104.50%		101.04%		102.78%		85.93%		99.09%		105.83%		
Direct Expense			107655		79537		268501		97192		150975		180525						
Under 100% = Reduction in Expense	Yr/Yr Growth		87.05%		106.38%		104.39%		113.05%		89.85%		100.89%						
Cost Recovery %		100%	114.93%		143.57%		124.43%		150.92%		125.37%		99.33%						
Customer Feedback - Goal is 50 responses per year per division																			
Number of Responses	50		12		104		75		17		56		6		8		25		
% YES Participation Met Expectations	80%		82%		97%		85%		94%		93%		100%		100%		96%		
% Very Satisfied Value Received	80%		67%		84%		90%		82%		77%		83%		88%		80%		
% YES Would Recommend to Friend	80%		75%		98%		93%		100%		93%		100%		100%		96%		